

Monthly Indicators



September 2026

U.S. existing-home sales fell 2.0% from the previous month and 1.2% from a year earlier to a seasonally adjusted annual rate of 3.98 million, the first reading below 4 million since June 2025, according to the National Association of REALTORS® (NAR). Sales held steady in the West and declined in the Northeast, Midwest, and South. Compared with a year earlier, sales were unchanged in the South and declined in the Northeast, Midwest, and West.

New Listings were down 0.5 percent to 2,008. Pending Sales increased 7.9 percent to 1,400. Inventory grew 0.1 percent to 5,590 units.

Median Sales Price was up 0.7 percent to \$425,000. Days on Market increased 7.8 percent to 55 days. Months Supply of Inventory was down 5.3 percent to 3.6 months.

Heading into September, there were 1.62 million homes listed for sale, up 3.2% from the previous month and 5.9% from a year earlier, the first time inventory has exceeded 1.6 million units since November 2019, NAR reported. That represents a 4.9-month supply at the current sales pace, up from 4.6 months a month earlier and the highest level in over ten years, according to NAR Chief Economist Lawrence Yun. The median existing-home sales price rose 1.6% year-over-year to \$429,100, marking 38 consecutive months of annual gains, and year-to-date sales are up 1.6%. The Federal Reserve raised its benchmark rate by a quarter point on September 16 to a range of 3.75% to 4%, its first increase since July 2023, and the 30-year fixed-rate mortgage moved above 7% in late September, up from an August average of 6.67%, according to Freddie Mac.

Quick Facts

+ 9.5%	+ 0.7%	- 5.3%
One-Year Change in Closed Sales	One-Year Change in Median Sales Price	One-Year Change in Months Supply

A research tool provided by the Charleston Trident Association of REALTORS®. Percent changes are calculated using rounded figures.

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Market Overview

Key market metrics for the current month and year-to-date figures.



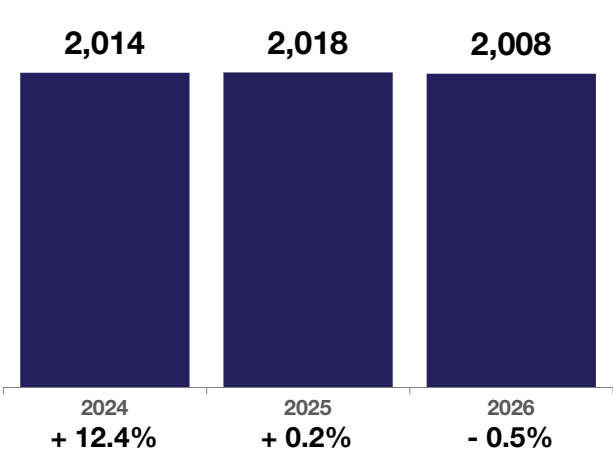
Key Metrics	Historical Sparkbars	09-2025	09-2026	Percent Change	YTD 2025	YTD 2026	Percent Change
New Listings		2,018	2,008	- 0.5%	20,399	21,432	+ 5.1%
Pending Sales		1,297	1,400	+ 7.9%	13,970	14,968	+ 7.1%
Closed Sales		1,404	1,538	+ 9.5%	13,686	14,434	+ 5.5%
Days on Market		51	55	+ 7.8%	48	52	+ 8.3%
Median Sales Price		\$422,000	\$425,000	+ 0.7%	\$425,250	\$435,000	+ 2.3%
Average Sales Price		\$630,960	\$700,519	+ 11.0%	\$646,804	\$691,019	+ 6.8%
Pct. of Orig. Price Received		95.5%	95.6%	+ 0.1%	96.2%	96.0%	- 0.2%
Housing Affordability Index		80	75	- 6.3%	79	74	- 6.3%
Inventory of Homes for Sale		5,584	5,590	+ 0.1%	--	--	--
Months Supply of Inventory		3.8	3.6	- 5.3%	--	--	--

New Listings

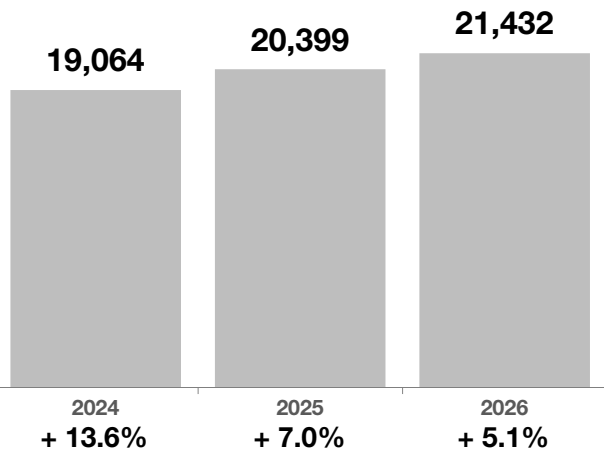
A count of the properties that have been newly listed on the market in a given month.



September

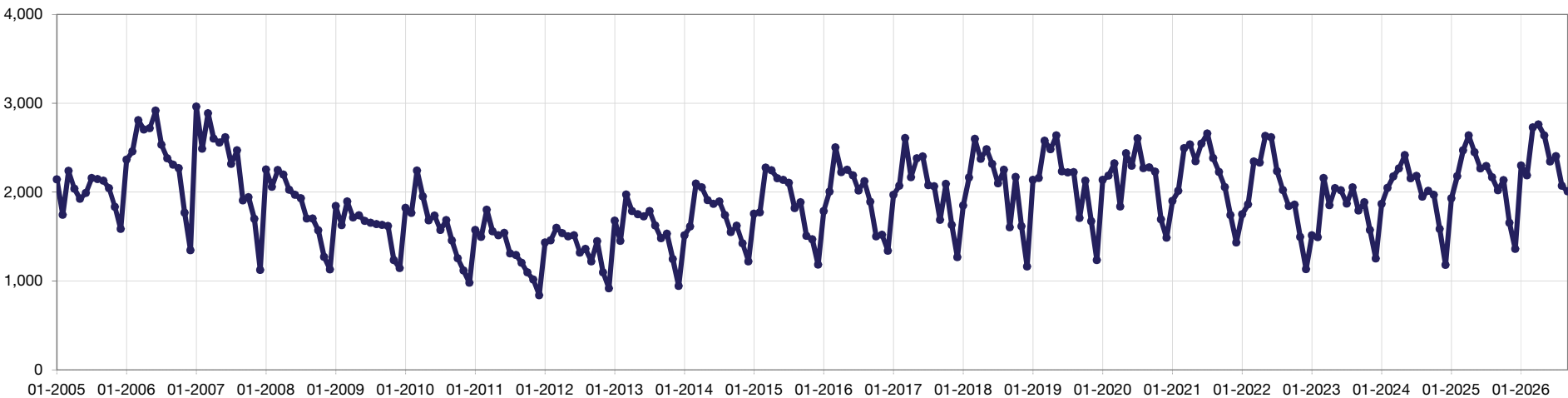


Year to Date



New Listings		Prior Year	Percent Change
October 2025	2,133	1,967	+8.4%
November 2025	1,654	1,583	+4.5%
December 2025	1,359	1,179	+15.3%
January 2026	2,299	1,928	+19.2%
February 2026	2,187	2,178	+0.4%
March 2026	2,727	2,469	+10.4%
April 2026	2,759	2,635	+4.7%
May 2026	2,636	2,449	+7.6%
June 2026	2,342	2,265	+3.4%
July 2026	2,403	2,292	+4.8%
August 2026	2,071	2,165	-4.3%
September 2026	2,008	2,018	-0.5%
12-Month Avg	2,215	2,094	+5.8%

Historical New Listings by Month

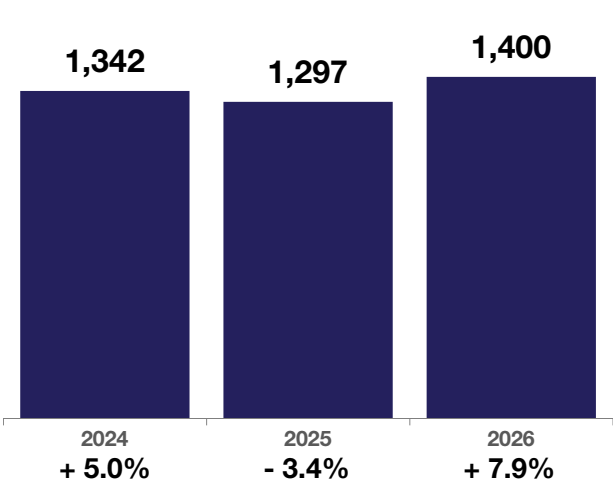


Pending Sales

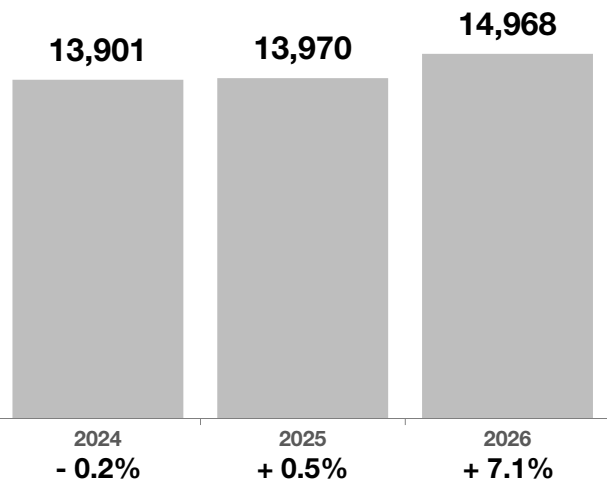
A count of the properties on which offers have been accepted in a given month.



September

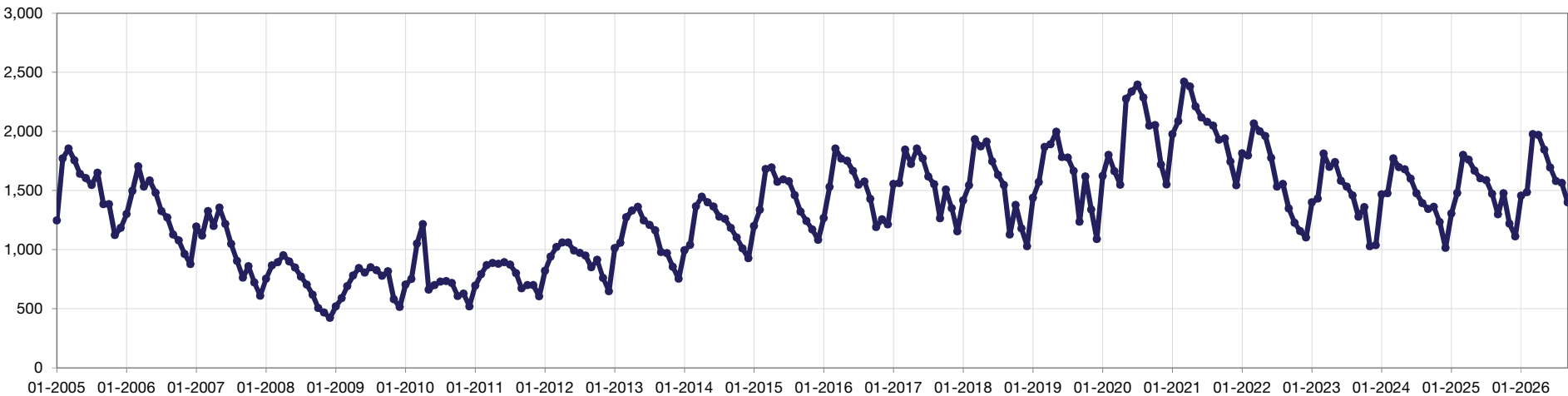


Year to Date



Pending Sales		Prior Year	Percent Change
October 2025	1,477	1,361	+8.5%
November 2025	1,219	1,233	-1.1%
December 2025	1,111	1,014	+9.6%
January 2026	1,456	1,305	+11.6%
February 2026	1,486	1,479	+0.5%
March 2026	1,975	1,801	+9.7%
April 2026	1,970	1,759	+12.0%
May 2026	1,845	1,667	+10.7%
June 2026	1,694	1,603	+5.7%
July 2026	1,579	1,587	-0.5%
August 2026	1,563	1,472	+6.2%
September 2026	1,400	1,297	+7.9%
12-Month Avg	1,565	1,465	+6.8%

Historical Pending Sales by Month

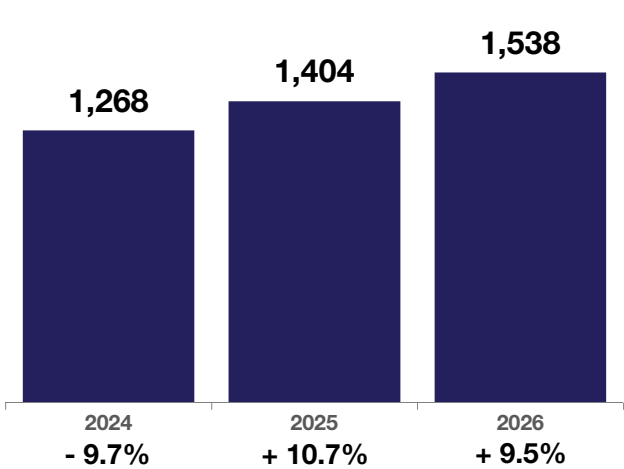


Closed Sales

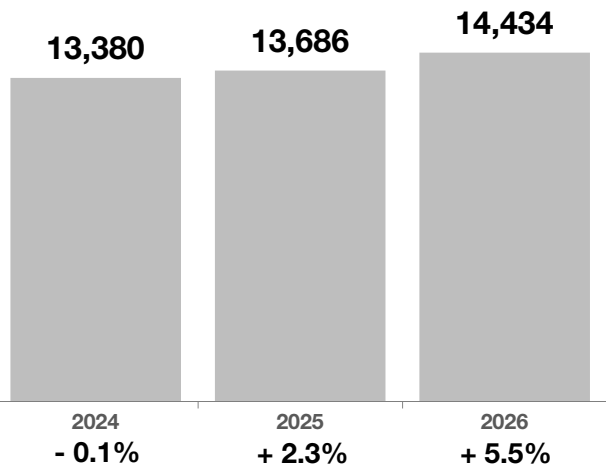
A count of the actual sales that closed in a given month.



September

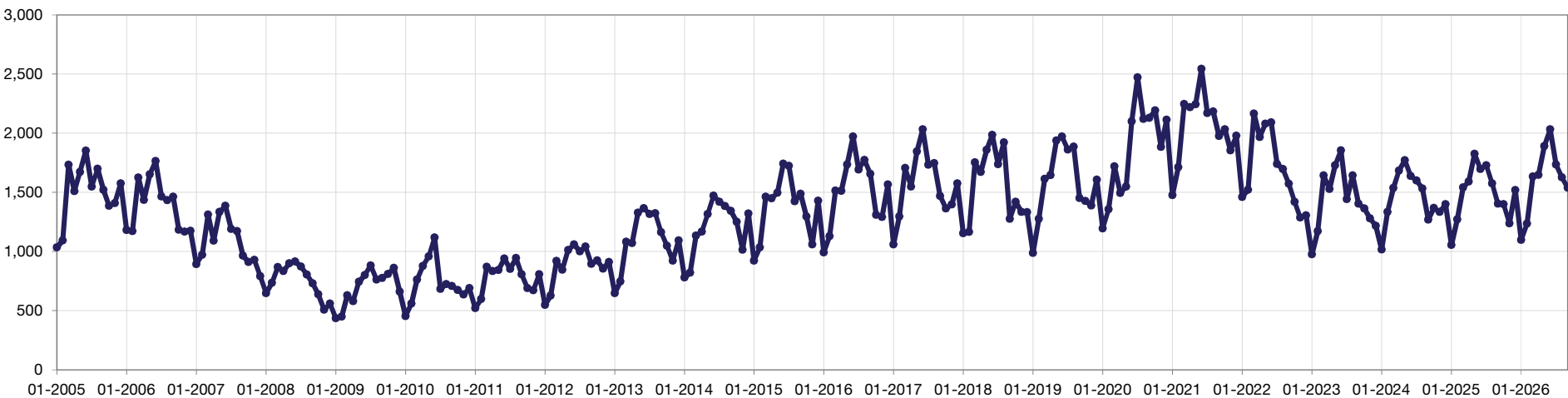


Year to Date



Closed Sales		Prior Year	Percent Change
October 2025	1,399	1,368	+2.3%
November 2025	1,237	1,333	-7.2%
December 2025	1,518	1,399	+8.5%
January 2026	1,097	1,054	+4.1%
February 2026	1,235	1,271	-2.8%
March 2026	1,633	1,541	+6.0%
April 2026	1,647	1,591	+3.5%
May 2026	1,891	1,824	+3.7%
June 2026	2,031	1,696	+19.8%
July 2026	1,735	1,729	+0.3%
August 2026	1,627	1,576	+3.2%
September 2026	1,538	1,404	+9.5%
12-Month Avg	1,549	1,482	+4.5%

Historical Closed Sales by Month

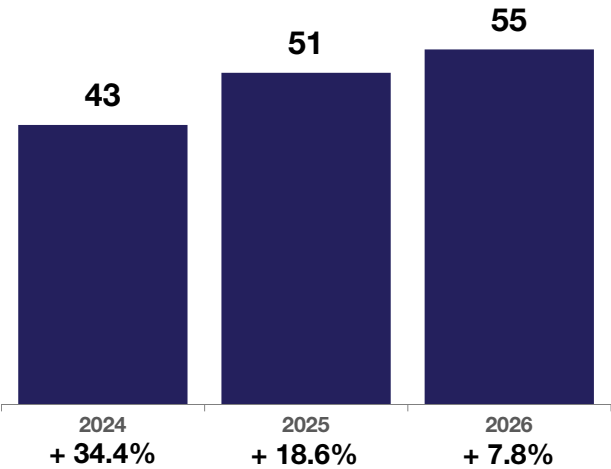


Days on Market Until Sale

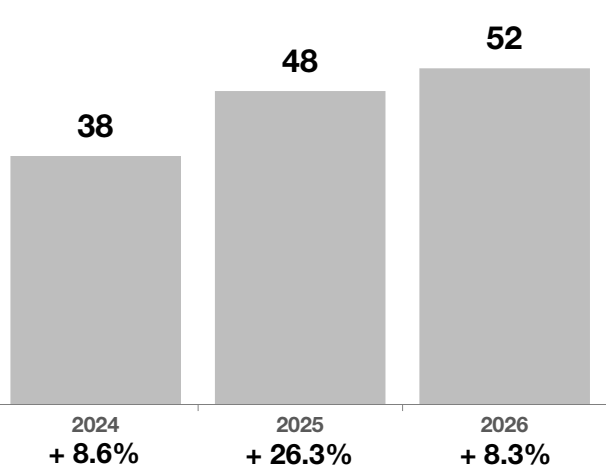
Average number of days between when a property is listed and when an offer is accepted in a given month.



September



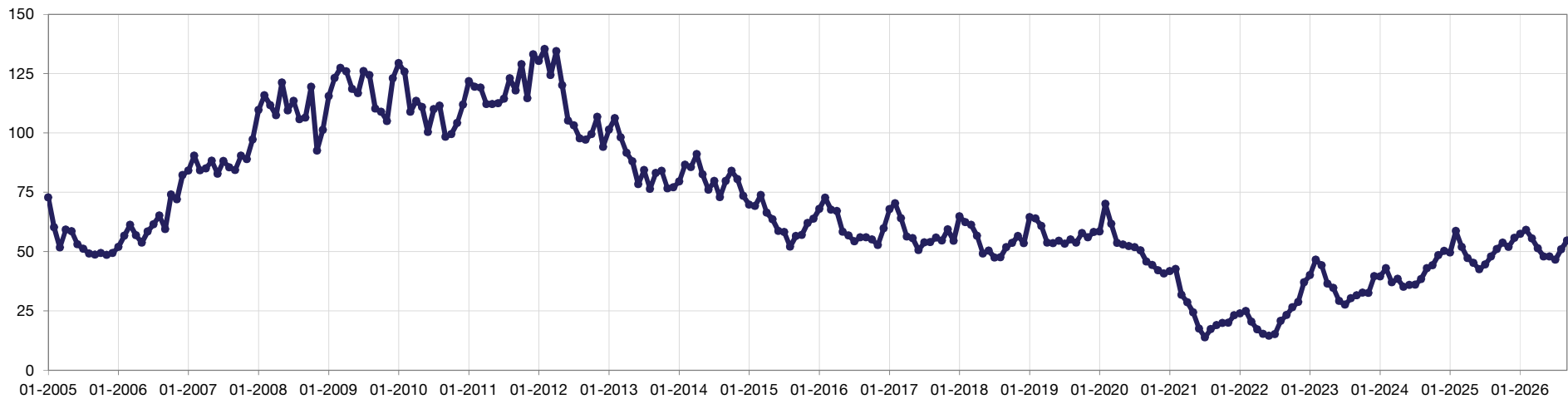
Year to Date



Days on Market		Prior Year	Percent Change
October 2025	54	44	+22.7%
November 2025	52	48	+8.3%
December 2025	56	50	+12.0%
January 2026	57	50	+14.0%
February 2026	59	59	0.0%
March 2026	56	52	+7.7%
April 2026	51	47	+8.5%
May 2026	48	45	+6.7%
June 2026	48	43	+11.6%
July 2026	47	45	+4.4%
August 2026	51	48	+6.3%
September 2026	55	51	+7.8%
12-Month Avg*	52	48	+8.3%

* Average Days on Market of all properties from October 2025 through September 2026. This is not the average of the individual figures above.

Historical Days on Market Until Sale by Month



Median Sales Price

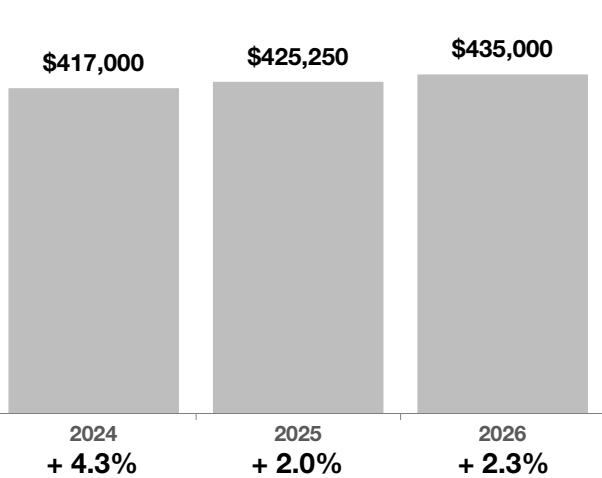
Point at which half of the sales sold for more and half sold for less, not accounting for seller concessions, in a given month.



September



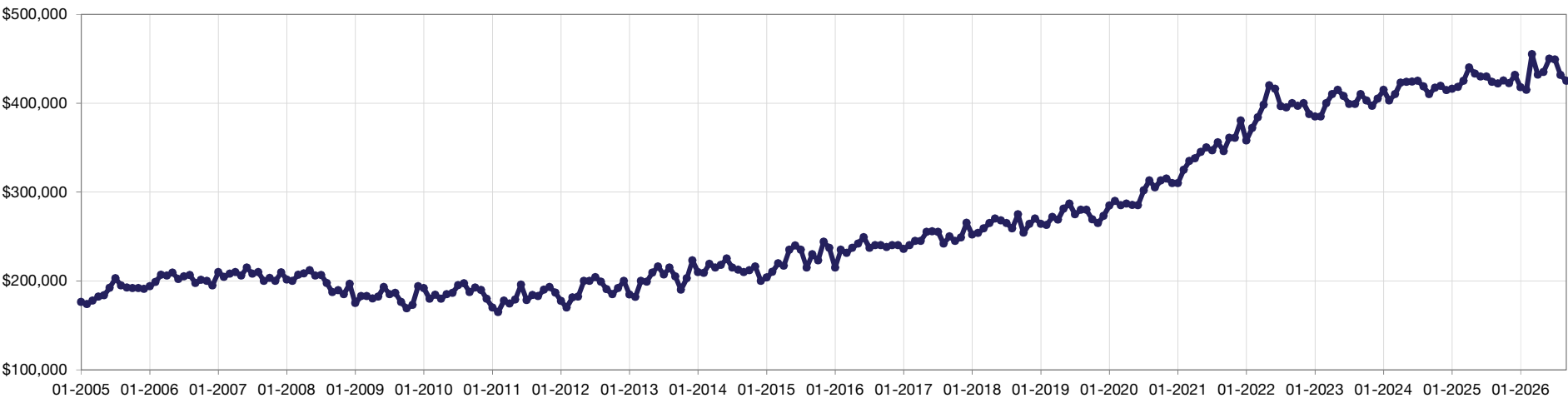
Year to Date



	Median Sales Price	Prior Year	Percent Change
October 2025	\$425,400	\$417,299	+1.9%
November 2025	\$422,295	\$419,314	+0.7%
December 2025	\$431,825	\$414,556	+4.2%
January 2026	\$417,990	\$416,159	+0.4%
February 2026	\$415,000	\$418,325	-0.8%
March 2026	\$455,000	\$425,000	+7.1%
April 2026	\$432,075	\$440,000	-1.8%
May 2026	\$435,000	\$433,213	+0.4%
June 2026	\$449,900	\$430,000	+4.6%
July 2026	\$449,000	\$429,950	+4.4%
August 2026	\$431,620	\$424,000	+1.8%
September 2026	\$425,000	\$422,000	+0.7%
12-Month Med*	\$434,020	\$425,000	+2.1%

* Median Sales Price of all properties from October 2025 through September 2026. This is not the median of the individual figures above.

Historical Median Sales Price by Month

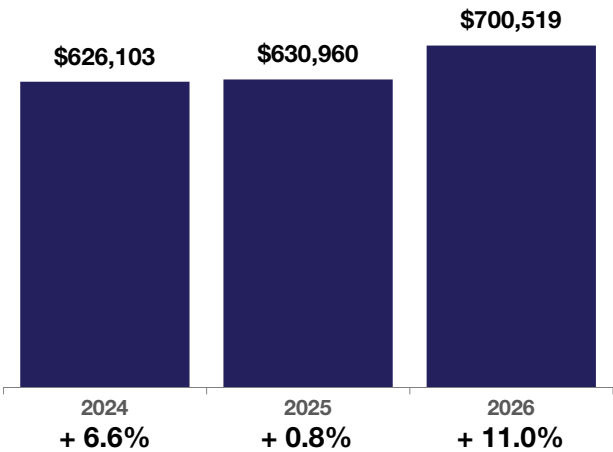


Average Sales Price

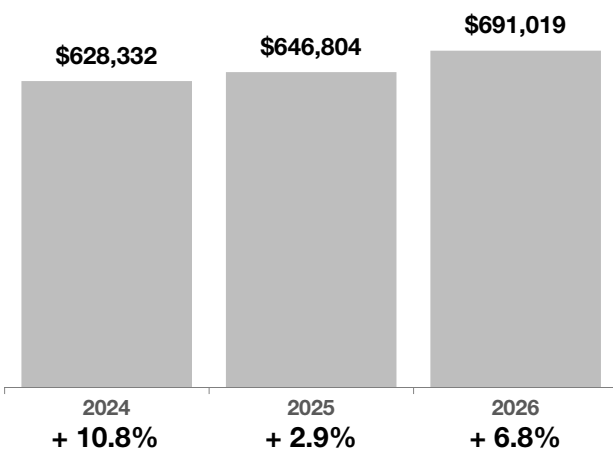
Average sales price for all closed sales, not accounting for seller concessions, in a given month.



September



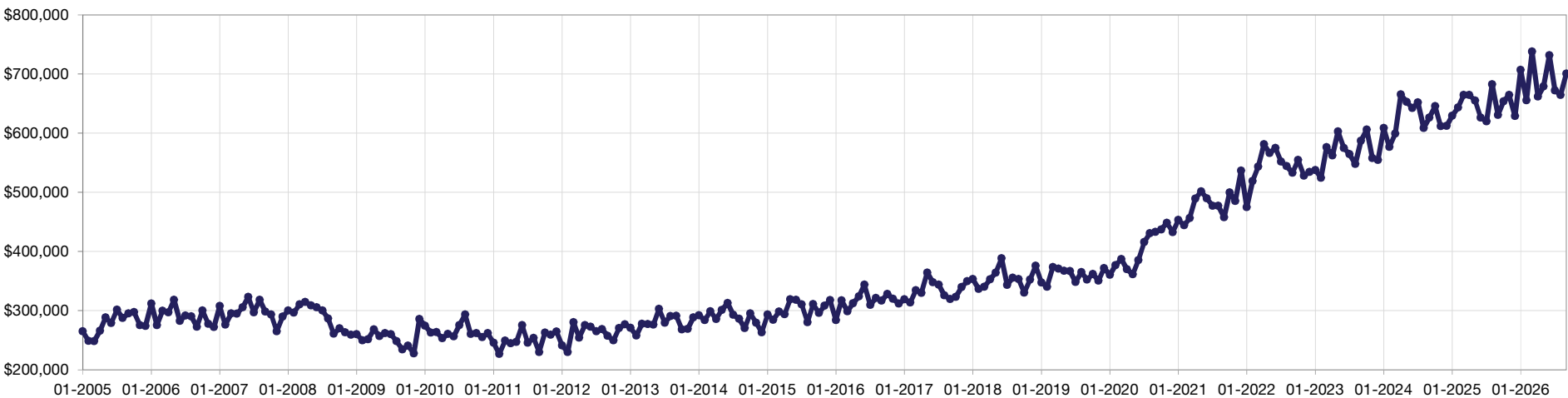
Year to Date



Avg. Sales Price	Prior Year	Percent Change
October 2025	\$653,491	\$645,446 +1.2%
November 2025	\$664,700	\$611,878 +8.6%
December 2025	\$629,098	\$612,226 +2.8%
January 2026	\$706,748	\$629,308 +12.3%
February 2026	\$655,389	\$643,468 +1.9%
March 2026	\$737,810	\$664,421 +11.0%
April 2026	\$661,713	\$664,615 -0.4%
May 2026	\$679,012	\$654,972 +3.7%
June 2026	\$731,393	\$626,192 +16.8%
July 2026	\$672,124	\$619,913 +8.4%
August 2026	\$664,460	\$682,381 -2.6%
September 2026	\$700,519	\$630,960 +11.0%
12-Month Avg*	\$679,705	\$640,482 +6.1%

* Avg. Sales Price of all properties from October 2025 through September 2026. This is not the average of the individual figures above.

Historical Average Sales Price by Month

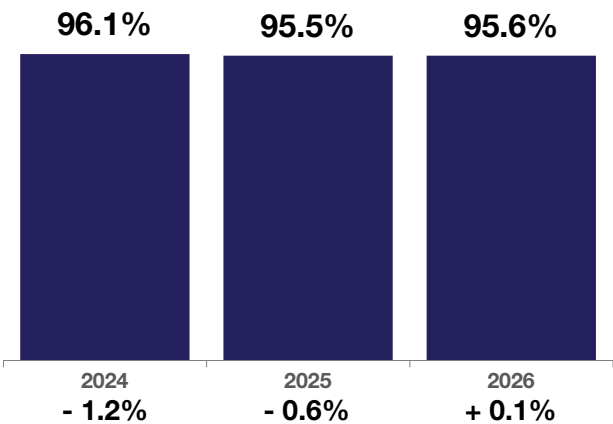


Percent of Original List Price Received

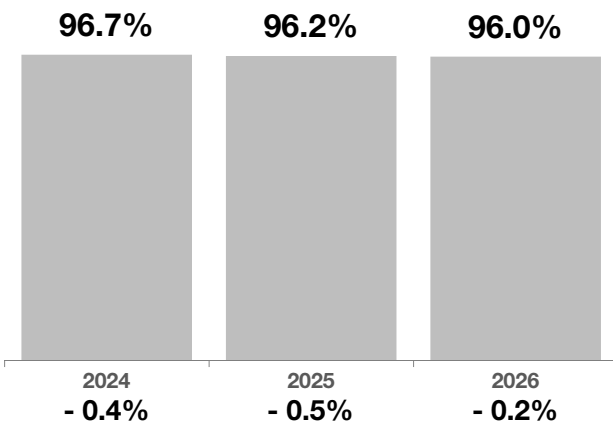
Percentage found when dividing a property’s sales price by its original list price, then taking the average for all properties sold in a given month, not accounting for seller concessions.



September



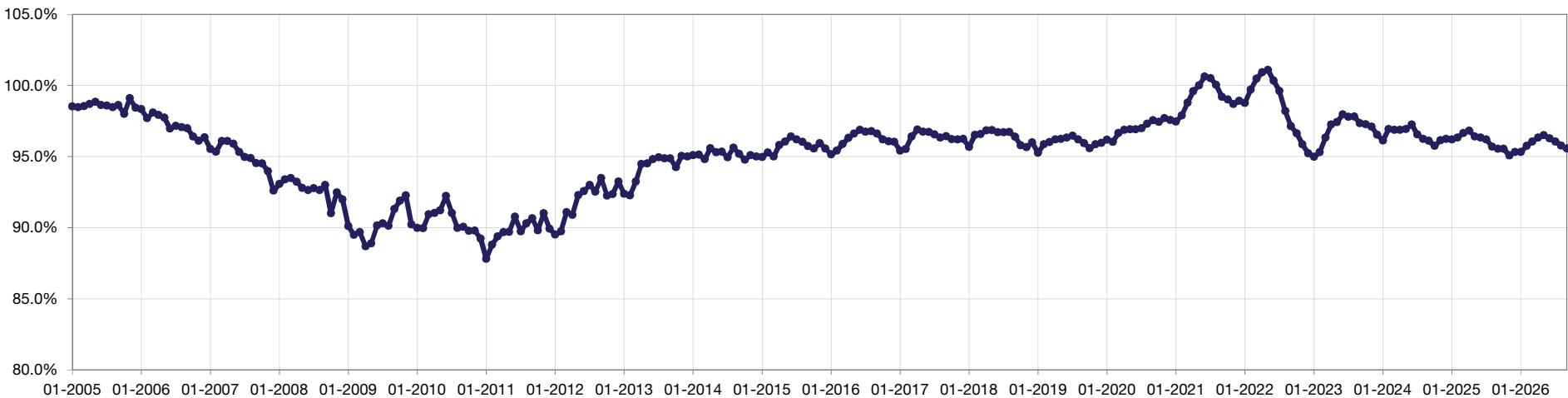
Year to Date



Pct. of Orig. Price Received		Prior Year	Percent Change
October 2025	95.5%	95.8%	-0.3%
November 2025	95.1%	96.1%	-1.0%
December 2025	95.3%	96.2%	-0.9%
January 2026	95.3%	96.2%	-0.9%
February 2026	95.7%	96.3%	-0.6%
March 2026	96.0%	96.6%	-0.6%
April 2026	96.3%	96.8%	-0.5%
May 2026	96.5%	96.4%	+0.1%
June 2026	96.3%	96.3%	0.0%
July 2026	96.0%	96.2%	-0.2%
August 2026	95.8%	95.7%	+0.1%
September 2026	95.6%	95.5%	+0.1%
12-Month Avg*		95.9%	-0.3%

* Average Pct. of Orig. Price Received for all properties from October 2025 through September 2026. This is not the average of the individual figures above.

Historical Percent of Original List Price Received by Month

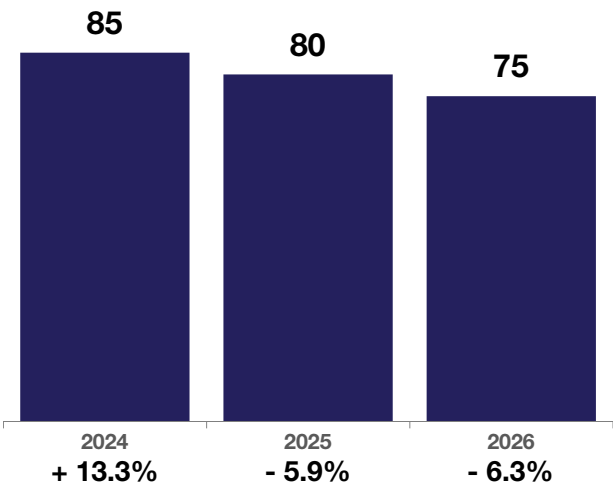


Housing Affordability Index

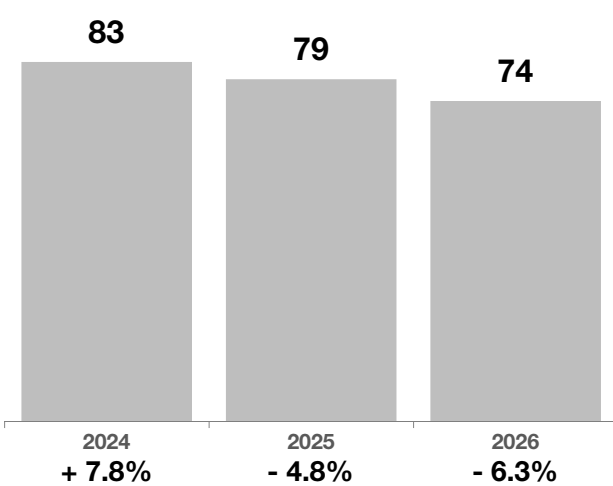
This index measures housing affordability for the region. For example, an index of 120 means the median household income is 120% of what is necessary to qualify for the median-priced home under prevailing interest rates. A higher number means greater affordability.



September



Year to Date



Affordability Index		Prior Year	Percent Change	
October 2025	81	80	+1.3%	
November 2025	81	78	+3.8%	
December 2025	80	78	+2.6%	
January 2026	83	77	+7.8%	
February 2026	84	78	+7.7%	
March 2026	74	78	-5.1%	
April 2026	79	74	+6.8%	
May 2026	77	74	+4.1%	
June 2026	74	76	-2.6%	
July 2026	73	76	-3.9%	
August 2026	76	78	-2.6%	
September 2026	75	80	-6.3%	
12-Month Avg		78	77	+1.1%

Historical Housing Affordability Index by Month

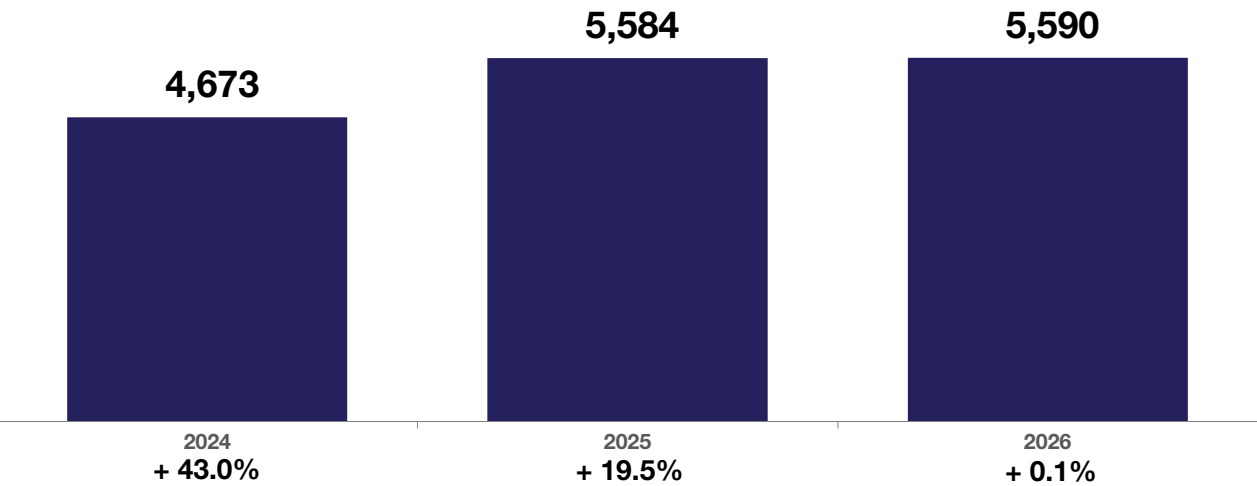


Inventory of Homes for Sale

The number of properties available for sale in active status at the end of a given month.



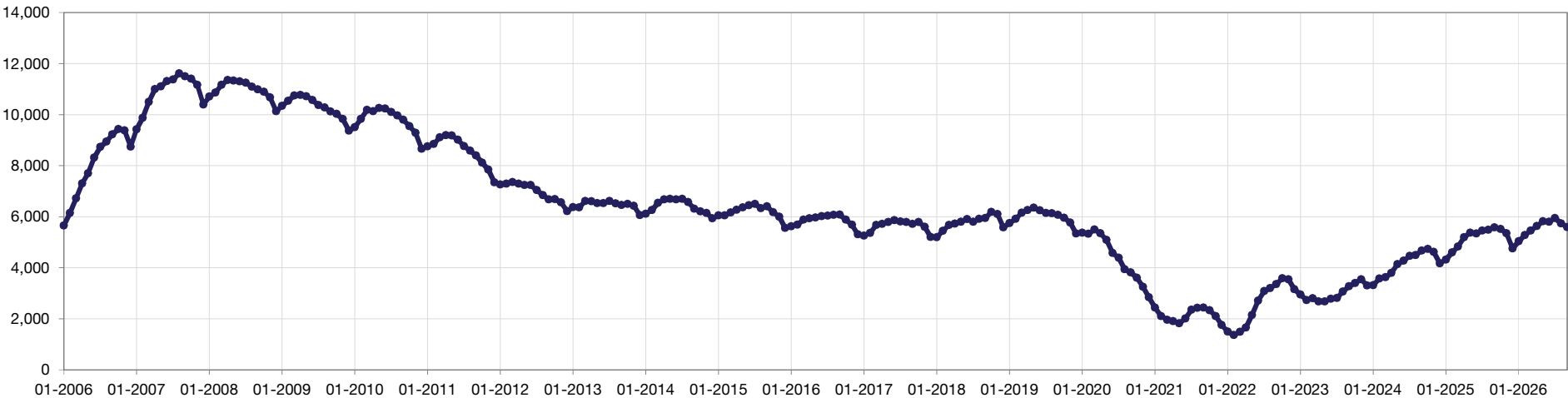
September



Homes for Sale		Prior Year	Percent Change
October 2025	5,518	4,731	+16.6%
November 2025	5,353	4,616	+16.0%
December 2025	4,758	4,166	+14.2%
January 2026	5,035	4,314	+16.7%
February 2026	5,272	4,603	+14.5%
March 2026	5,453	4,827	+13.0%
April 2026	5,632	5,190	+8.5%
May 2026	5,820	5,373	+8.3%
June 2026	5,803	5,340	+8.7%
July 2026	5,940	5,449	+9.0%
August 2026	5,733	5,484	+4.5%
September 2026	5,590	5,584	+0.1%
12-Month Avg*	5,492	4,973	+10.4%

* Homes for Sale for all properties from October 2025 through September 2026. This is not the average of the individual figures above.

Historical Inventory of Homes for Sale by Month

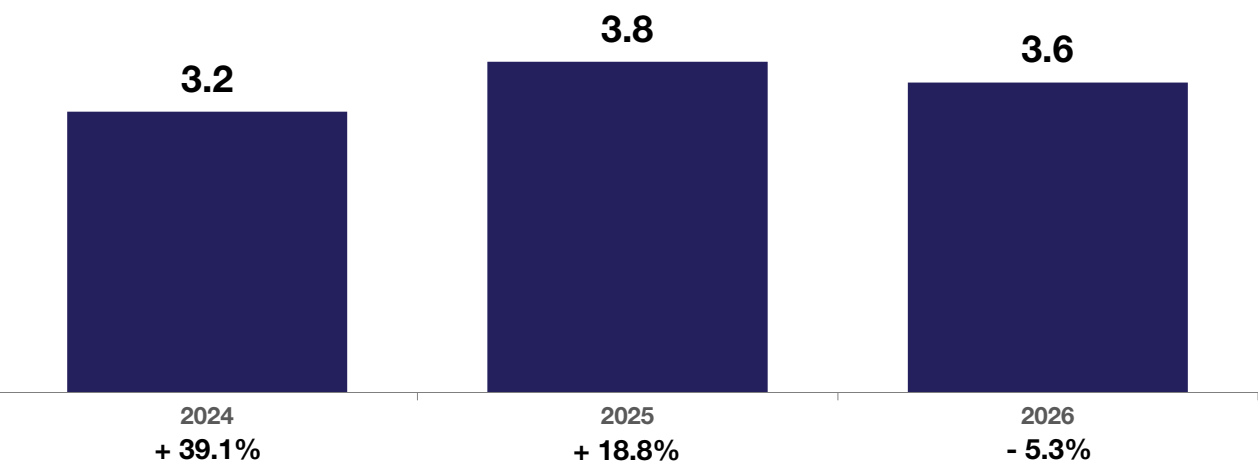


Months Supply of Inventory

The inventory of homes for sale at the end of a given month, divided by the average monthly pending sales from the last 12 months.



September



Months Supply		Prior Year	Percent Change
October 2025	3.7	3.3	+12.1%
November 2025	3.6	3.2	+12.5%
December 2025	3.2	2.9	+10.3%
January 2026	3.4	3.0	+13.3%
February 2026	3.5	3.2	+9.4%
March 2026	3.6	3.3	+9.1%
April 2026	3.7	3.6	+2.8%
May 2026	3.8	3.7	+2.7%
June 2026	3.7	3.7	0.0%
July 2026	3.8	3.7	+2.7%
August 2026	3.7	3.7	0.0%
September 2026	3.6	3.8	-5.3%
12-Month Avg*	3.6	3.4	+5.9%

* Months Supply for all properties from October 2025 through September 2026. This is not the average of the individual figures above.

Historical Months Supply of Inventory by Month

